North Carolina
Department of
Health and Human Services

HIS Local Setup Instructions

Post GoLive

Health Information System (HIS)

Version 2.0

Prepared By:

HIS Project Team – Business Support Group
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Setup Tasks – Post GoLive

The following tasks will be addressed by your agency after your GoLive date. Many of these activities will be ongoing tasks. Use this page to check off completed activity.

	Task(s)	Associated Instruction(s)
☐	Enter New Practitioners NOTE: This is an ongoing activity. The steps detailed below are identical to the steps outlined in section 5 of the Now through GoLive Setup document.	• 1.1 Enter New Practitioners
☐	Establish a Clinic Site for Clinic Appointment Scheduling	• 1.2 Establish Clinic Sites
☐	Add and/or modify Service Code fees	• 1.3 Add/Modify Service Code Fees
☐	Add/Modify Flat Fees to a Service Code	• 1.4 Add/Edit Flat Fee
☐	Add Practitioner Number by Guarantor and Program	• 1.5 Add Practitioner Number by Guarantor and Program
☐	Verify Alert Types that currently exist in your RSC	• 1.6 Verify Alert Types
☐	Modify user association as practitioner as needed. NOTE: During the 1 Week Setup Tasks, you were instructed on how to associate users as Practitioners in HIS. If a user is identified as a practitioner and does not need this association, please refer to this section on how to modify the practitioner association.	• 1.7 Remove user - practitioner association
☐	Enter new appointments into HIS. NOTE: If you are using the **Appointment Scheduling** option in HIS and have questions, please contact the HIS Project Team. District Setup Note: This task should be handled at the local level (i.e., 100 level RSCs). Make sure you are logged into the applicable sub-RSC before addressing this task.	• HIS User Manual – Appointment Scheduling (location: HIS Website > Training & System Resources > HIS Manual) • HIS eLearning on Scheduling
☐	Enter new locally defined Sliding Fee Scale.	• 1.8 Enter New Sliding Fee Scale

1.1 Enter New Practitioners

District Setup Note: This task should be handled at the District level (i.e., 200 level RSCs) as practitioners can provide service in each district agency.

For practitioners that were not included during data conversion, the following steps detail how to enter a new practitioner. These are the same steps detailed in the *Local Setup Instructions – Now through GoLive* document.

Avatar Path:

Avatar PH > Practitioner > Practitioner Registration > Practitioner Enrollment

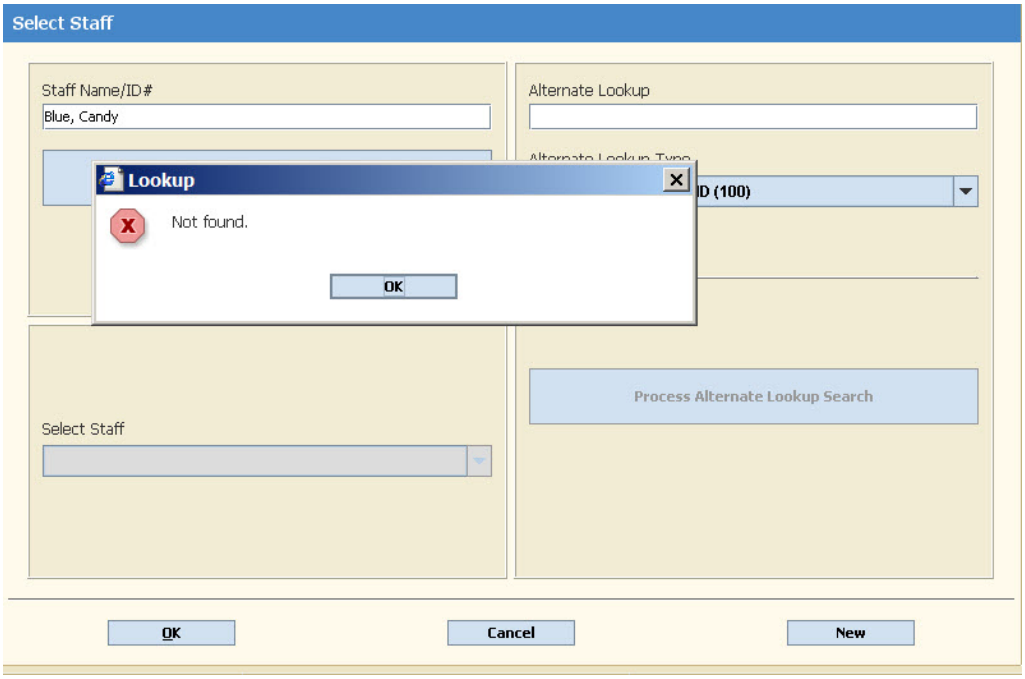

Figure 1: Practitioner Registration – Practitioner Enrollment Search

1. Enter the practitioner's name in the **Staff Name/ID#** field.
2. Click the **Select Staff Name/Id# Search** button.

   NOTE: A Lookup dialog box displays, indicating the individual is not found. The **New** button is now active. Click the **OK** button to continue.

3. Click the **New** button.

   NOTE: The "New ID" dialog box displays indicating, the ID number assigned to the practitioner. Click **OK** to continue.

Figure 2: New ID dialog box

4. The **Practitioner Enrollment** option displays.

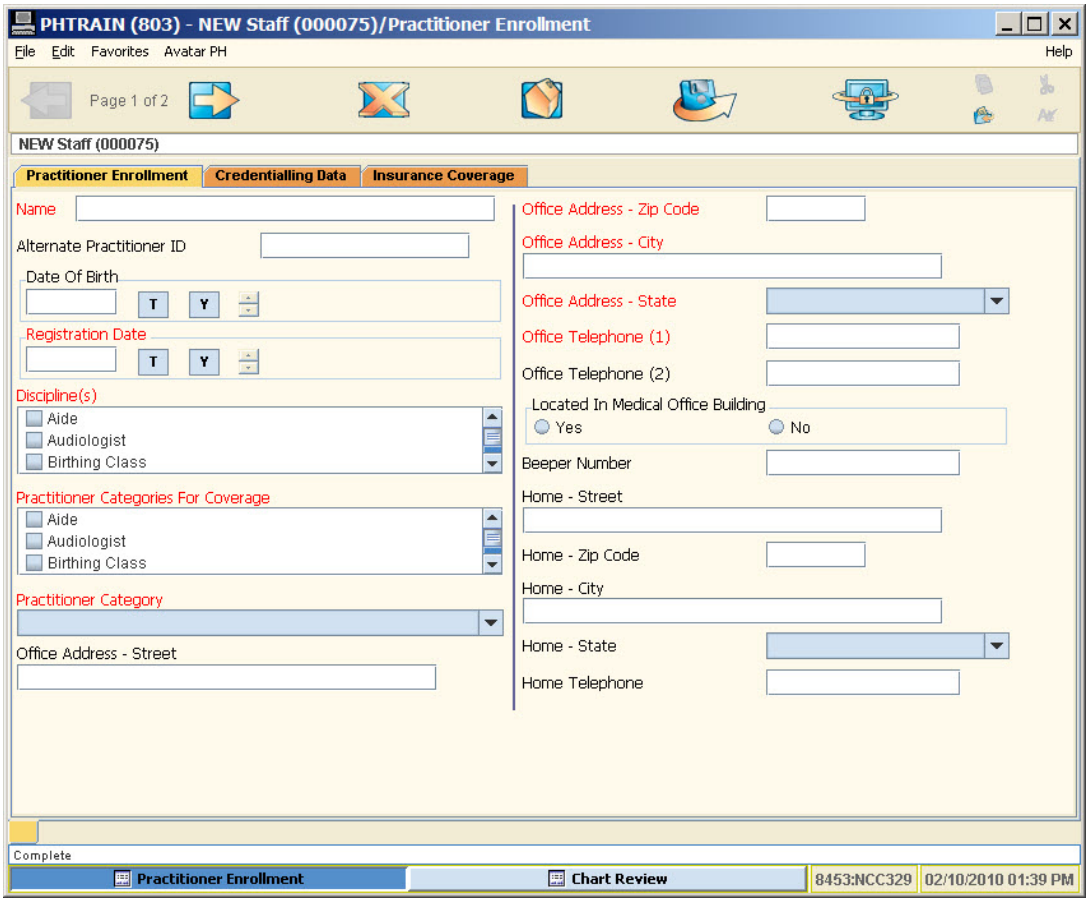

Figure 3: Practitioner Enrollment option

5. Enter the practitioner's name in the **Name** field.

   NOTE: Enter the name following the *Last Name,First Name* format.
6. Enter today's date or the practitioner's date of hire in the **Registration Date** field.
7. Select all applicable specialty areas for the practitioner in the **Discipline(s)** field.

   NOTE: A practitioner can have more than one discipline selected in this field.
8. Select the appropriate categories in the **Practitioner Categories for Coverage** field.

   NOTE: This field determines whether certain services are covered by this practitioner.
9. Select the category that identifies the service provided by the practitioner in the **Practitioner Category** drop-down field.

   NOTE: For Dentists, use *Other PH Professional*.
10. Enter the practitioner's office address zip code in the **Office Address – Zip Code** field.

    NOTE: When you tab out of this field, the **Office Address - City** and **Office Address - State** fields will automatically populate.
11. Enter the practitioner's office telephone number in the **Office Telephone (1)** field.
12. Click the **Submit** button to complete the process.

    NOTE: No entries are required on Page 2 of the **Practitioner Enrollment** tab and it is optional to complete the fields within the **Credentialing Data** and **Insurance Coverage** tabs.

1.2 Establish a Clinic Site for Clinic Appointment Scheduling

District Setup Note: This task should be handled at the local level (i.e., 100 level RSCs). Make sure you are logged into the applicable sub-RSC before addressing this task.

Instructions on establishing a clinic and scheduling clients to a clinic are available within the following document: *How To Establish A Clinic Site for Clinic Appointment Scheduling* document, which is available on the HIS Website (Training & System Manuals > How To Help Guides).

NOTE: When establishing a clinic in HIS, the process outlined within this How To document should be replicated for each clinic site.

In this resource, you will be provided setup information for the following tasks:

- Establish clinic sites using the **Site Registration** option.
- Create time slots within your established clinics.
- Establish site hours of operation.

  NOTE: This process is required only if you are using the **Appointment Scheduling** option. See the note below regarding the use of this option.
- Establish clinic holiday schedule, which identifies specific time a clinic will be closed.
- Identify users in your local agency that are allowed to modify clinic schedule using the **Site Schedule Allowable Users** option.
- Identify user in your local agency that are allowed to access the overbooking function using the **Site Overbooking Allowable Users** option.

NOTE

If you plan to use the **Appointment Scheduling** option in Avatar, please refer to the HIS User Manual and eLearning on using the Appointment Scheduling option in HIS. If you have questions, please contact the HIS Project Team.

1.3 Add/Modify Service Fees

District Setup Note: This task should be handled at the District level (i.e., 200 level RSC) to ensure that only one fee for a service exists for all sub-RSCs.

Service codes will be maintained at the State level and service fee maintenance is the local agency's responsibility. Service fees in HSIS will be converted over to HIS. However, as service fees change, it is the responsibility of each agency to update their fees. For more information on how to manage your agency's service fees, please refer the following resource: *Manage Service Fees Using Service Fee Maintenance*. This document is available on the HIS Website (Training & System Manuals > How To Help Guides).

The HIS Project Team recommends that you contact the Help Desk should you require any modifications to your service fees to ensure that management of your service fees occurs properly in HIS.

NOTE: Service fees will not display on the Service Fee Definition Report until the service fee is defined (i.e., effective date, fee type and fee amount). Instructions on how to set-up or edit a service see is located on the HIS Web site in the *Manage Service Fees Using Service Fee Maintenance 040910* document.

1.4 Add/Modify Flat Fee Service Charge

District Setup Note: This task should be handled at the District level (i.e., 200 level RSC) to ensure that only one fee for a service exists for all sub-RSCs.

Please reference the following resource for assigning a flat fee to a service code: *How to Manage Service Fees through the File Import Option*. This document is available on the HIS Website (Training & System Manuals > How To Help Guides).

The HIS Project Team recommends that you contact the Help Desk should you require any modifications to your service fees to ensure that management of your service fees occurs properly in HIS.

1.5 Add Practitioner Number by Guarantor and Program

District Setup Note: This task should be handled at the District level (i.e., 200 level RSCs) as practitioners can provide service in each district agency.

If your local agency bills Medicaid for behavioral health, please refer to the *How To Set Up Medicaid Guarantor / Program Billing Defaults for LHD* document. Within this document, specific instructions are provided for setting up the **Practitioner Numbers by Guarantors and Program** option. The How To guide is located on the HIS Website (Training & System Manuals > How To Help Guides).

1.6 Verify Alert Types

District Setup Note: This task should be handled at the District level (i.e., 200 level RSCs) as alert types may be standardized across all sub-RSCs.

Client alerts allow your local agency to associate defined alerts to a specific client. A client alert is initiated when the associated client is selected. HIS currently contains client alerts; however, your local agency may require additional alert types due to local policy and procedures. Review the alert types within the system. If additional alert types are needed, use the HIS Request Form to request additional alert types be added to your RSC. You can locate the HIS Request From on the HIS Website (Training & System Manual > Forms).

Avatar Path:

Avatar PH > RADplus Utilities > Client Alert Management > Client Alerts

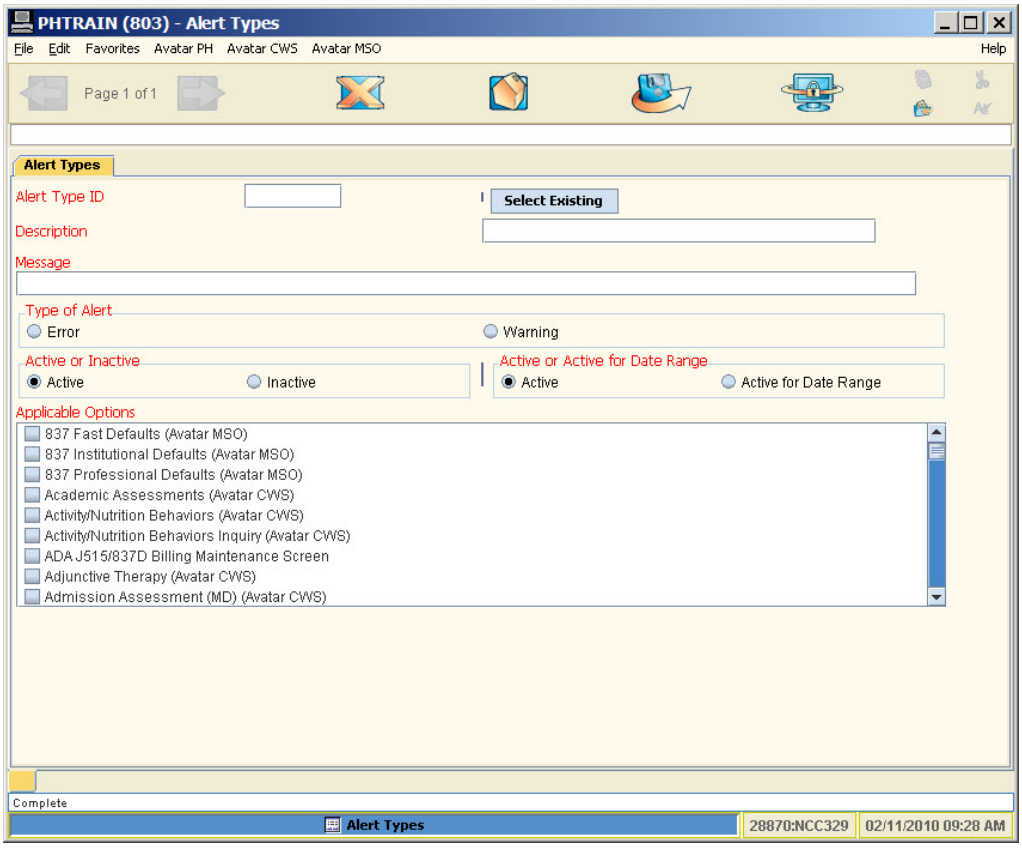

Figure 4: Alert Types option

1. Click the **Select Existing** button.

   NOTE: The **Select Existing Alert Type Description (Type ID)** window that displays.

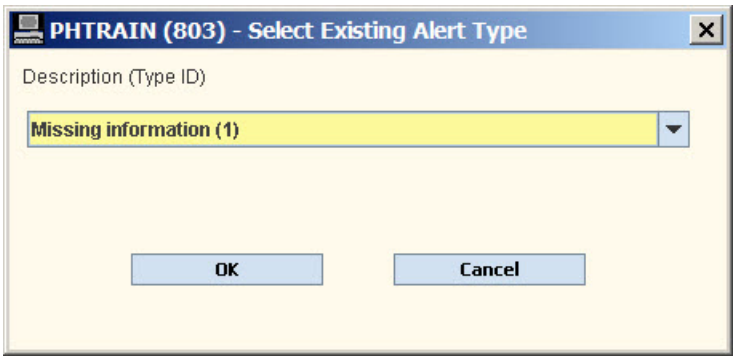

Figure 5: Alert Types option

2. Review the available alert types listed in the **Select Existing Alert Type Description (Type ID)** window.

Again, if additional alert types are needed, use the HIS Request Form to request additional alert types be added to your RSC. You can locate the HIS Request From on the HIS Website (Training & System Manual > Forms).

1.7 Remove User - Practitioner Association

District Setup Note: This task should be handled at the District level (i.e., 200 level RSCs) as practitioners can provide service in each district agency.

The following process removes the practitioner association to a selected user in your RSC. Remember that you should not customize a user role using the **Allow User Role Customization** field. You may also terminate a practitioner, which will remove the practitioner from the active staff roster; however, their information will remain in the system.

Avatar Path:

Avatar PH >> RADplus Utilities >>System Security >>User Definition

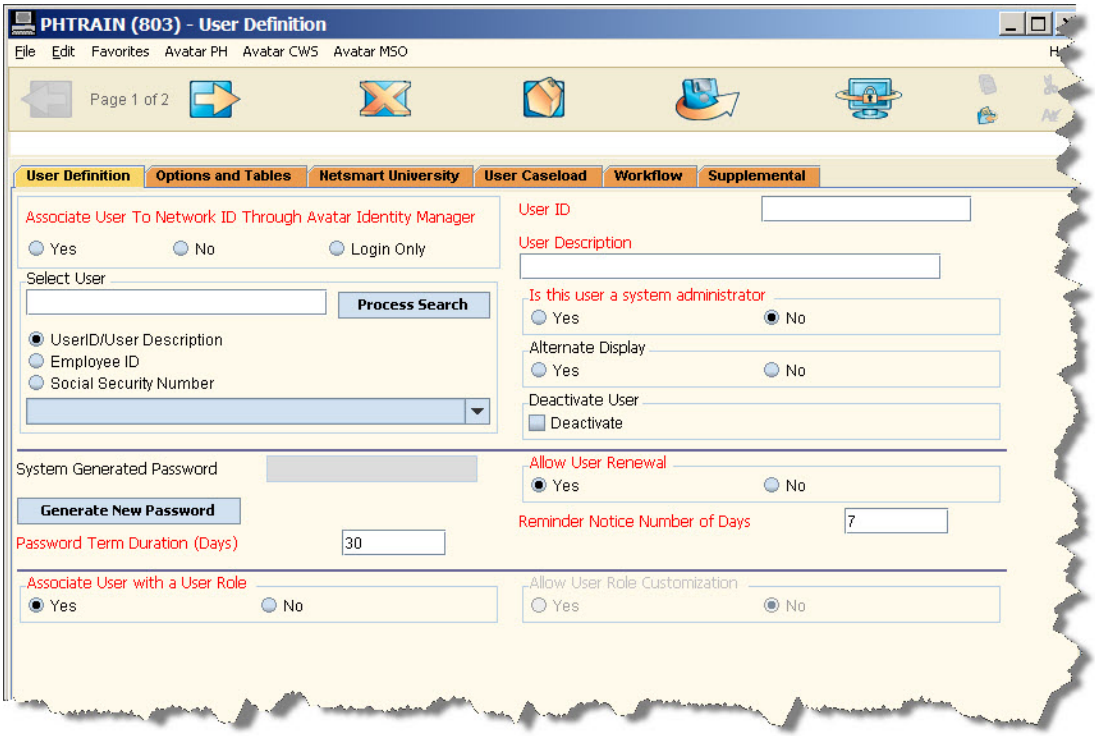

Figure 6: User Definition option – Page 1

1. Enter the user's name in the **Select User** field.
2. Click the **Process Search** button.

   NOTE: If multiple matches appear, select the intended user from the **Select User** drop-down field.
3. Select the **User Caseload** tab.

4. Select *No* in the **Is User a Staff Member** field.

   NOTE: This will disable and clear the **Staff Member** field.

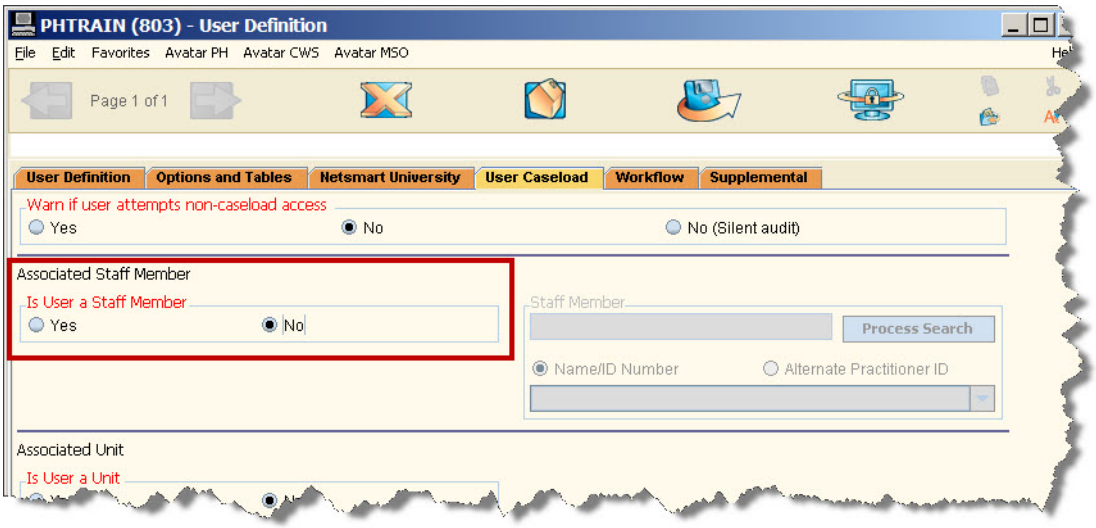

Figure 7: User Definition option – Page 2

5. Click the **Submit** button to save changes.

1.7.1 Practitioner Termination

Avatar Path to Practitioner Termination:
Avatar PH > Practitioner > Practitioner Registration > Practitioner Termination

1. Enter the practitioner's name in the **Staff Name/ID#** field.

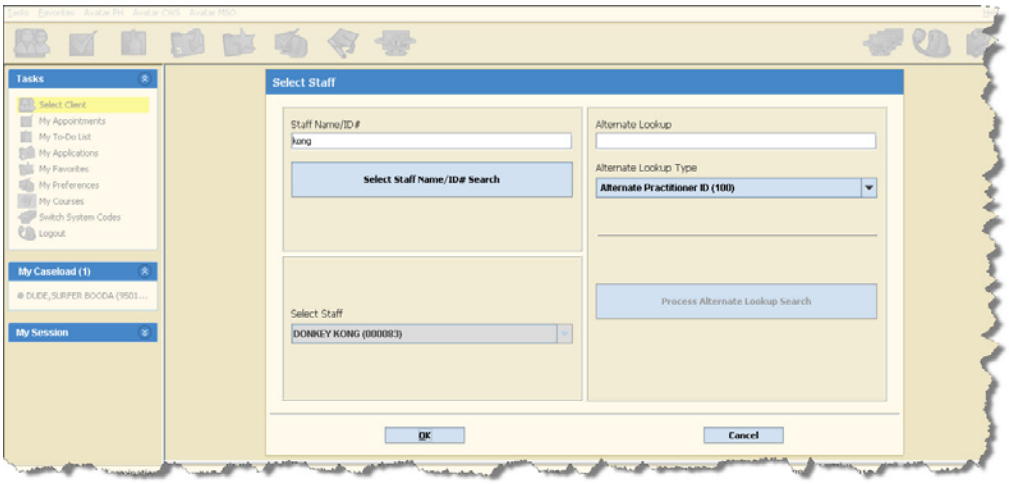

Figure 8: Select Staff

2. Click **OK**. The **Practitioner Termination** options displays.

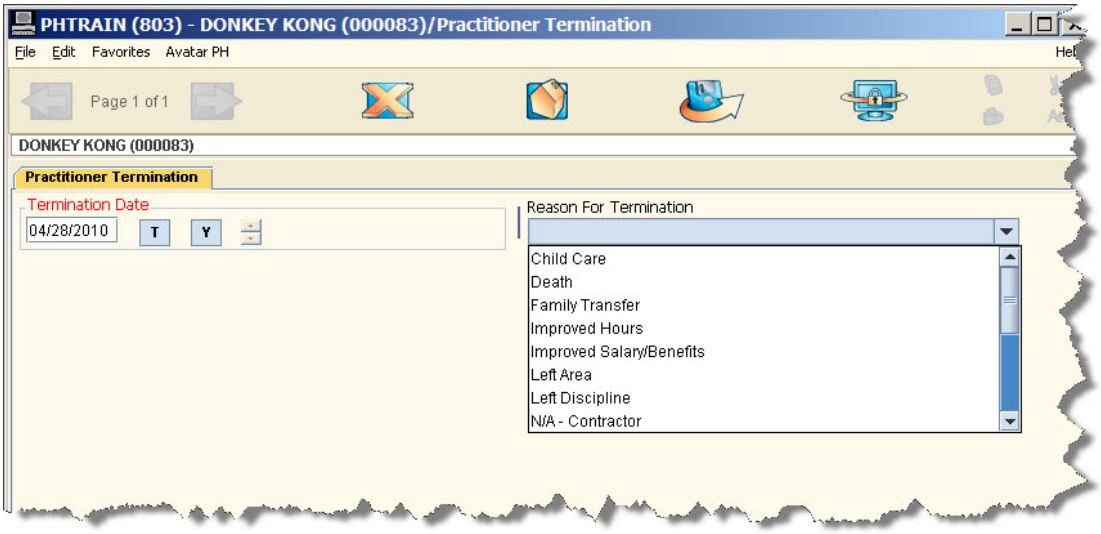

Figure 9: Practitioner Termination option

3. Enter the termination date in the **Termination Date** field.

4. Select the reason for termination from the **Reason For Termination** field, if applicable.

5. Click the **Submit** button.

   NOTE: Once you submit the termination, the option will automatically close.

1.8 Enter New Sliding Fee Scale

Please refer to the *How To Enter Sliding Fee Scale* located on the HIS Website (Training & System Manuals > How To Help Guides) for instructions on entering a Sliding Fee Scale into HIS.

District Setup Note: This task should be handled at the District level (i.e., 200 level RSCs) as the sliding fee scales used by a District should be consistent across all sub-RSCs.

****** End of Document ******